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Genesys Designer Help

Setup Survey Block

Setup Survey Block

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You can use the **Setup Survey** block in the **Assisted Service** phase to set up a survey for the caller.

Typically, you **offer the survey** earlier in the call, in either the **Self Service** phase or before routing begins in the **Assisted Service** phase. Then, once the caller has been served, place the **Setup Survey** block in the **Assisted Service** phase to provide the survey functions.

Once the block is set, you can choose to start the survey immediately (the caller completes the survey within the **Self Service** phase of the current application), or after the caller has finished talking to an agent (if they agreed earlier to take the survey, the caller is then sent to a number assigned to **a survey application**).

You can also choose to not start the survey if the caller rejects the offer or to not offer the survey at all.

Using this Block

In most applications, you will place a **User Input block** before the **Setup Survey** block and use prompts to ask the caller if he wants to take a survey. You can then use a **Segmentation block** to segment the call based on the caller's response.

The sections below explain how to incorporate a survey into an existing application. Your application and User Variable names might differ.

Important

The examples below offer the survey in the **Assisted Service** phase, but it is also possible to offer the survey in the **Self Service** phase. In either case, the **Setup Survey** block must be placed in the **Assisted Service** phase.

Offer the Survey

Click the **Initialize** phase and create a **User Variable** named **varSurveyResponse**.

The screenshot displays the Genesys Designer interface. On the left, the 'Application Flow' panel shows a vertical stack of phases: 'Initialize' (selected with a play icon), 'Self Service' (with a question mark icon), 'Assisted Service' (with a person icon), and 'Finalize' (with a checkmark icon). An 'Actions' dropdown is visible at the top right of this panel. On the right, the 'Properties - Initialize' panel is active. It contains a description: 'This block or phase is typically used to setup variables for the application and initialize them. Assign blocks can be used to calculate expressions and assign their results to variables in this phase.' Below this, there are tabs for 'User Variables' (selected) and 'System Variables'. A note states: 'Specify User Variables. String values must be surrounded by single quotes.' A '+ Add Variable' button is present. Below the button is a table with the following structure:

Name	Default Value	Private	Delete
varSurveyResponse		<input type="checkbox"/>	

Setup Survey Block

In the **Assisted Service** phase of your application, before the call is routed, add a **User Input** block and create a message in the **Prompts** tab. In this example, you can use the following values:

The screenshot displays the 'Application Flow' on the left and the 'Properties - User Input' configuration on the right.

Application Flow:

- Initialize
- Self Service
- Assisted Service (selected)
- User Input (added block)
- Call Data
- Segmentation - decide how to rou...
- Route Call - route to default numb...
- Finalize

Properties - User Input:

This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

Prompts | Input | ASR Settings | DTMF Settings | Retry

Results | Milestone

Specify prompts to play to collect user input

+ Add Prompt

Type	Var?	Value	Play as	Actions
TTS	<input type="checkbox"/>	Your feedback is important to us.	text	↑ ↓ ✕
TTS	<input type="checkbox"/>	We would like to offer you a survey.	text	↑ ↓ ✕
TTS	<input type="checkbox"/>	Press 1 to take the survey.	text	↑ ↓ ✕
TTS	<input type="checkbox"/>	Press 2 to not take the survey.	text	↑ ↓ ✕

☐ Prompts must finish completely before users can provide input

Timeout - wait for s before assuming that no input was received.

Next, in the **Results** tab, select the **varSurveyResponse** variable that you created earlier. This variable stores the input from the caller.

The screenshot displays the 'Application Flow' on the left and the 'Properties - User Input' configuration on the right, with the 'Results' tab selected.

Application Flow:

- Initialize
- Self Service
- Assisted Service (selected)
- User Input (added block)
- Call Data
- Segmentation - decide how to rou...
- Route Call - route to default numb...
- Finalize

Properties - User Input:

This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

Prompts | Input | ASR Settings | DTMF Settings | Retry

Results | Milestone

Store output result (either DTMF entered digits, or the ASR utterance) in this variable

varSurveyResponse

Store the output result details in this variable

-- choose variable --

The format of the output result details variable will be an object with the contents:

Key	Type	Description
success	boolean	Indicates if the user input was successfully received.

Next, place a **Segmentation** block to configure how your application responds to the result from the **User Input** block. In this example, configure the **Segmentation** block as shown below:

Setup Survey Block

Application Flow

Actions

Initialize

Self Service

Assisted Service

User Input

Segmentation

Set Up Survey

No Survey


Call Data

Segmentation - decide how to rou...

Route Call - route to default numb...

Finalize



Properties - Segmentation

 This block is used to evaluate expressions and take different paths in the application based on the outcome. E.g varZipCode==94014 can be used to take a different path vs varZipCode==95125.

Conditions

Milestone

+ Add Condition

Segment Label	Condition Expression	Delete
Set Up Survey	varSurveyResponse == 1	
No Survey	varSurveyResponse == 2	

Set Up Survey Segment

The application processes the **Set Up Survey** segment if the caller pressed **1** to accept the survey. Next, the application uses a **Play Message block** to thank the caller for taking the survey.

Application Flow

Actions

Initialize

Self Service

Assisted Service

User Input

Segmentation

Set Up Survey

Play Message

No Survey


Call Data

Segmentation - decide how to rou...

Route Call - route to default numb...







Finalize

Properties - Play Message

 This block is used to play audio messages. These messages can be TTS (Text to Speech), Audio Files (previously uploaded in Audio Resources page, or variables played as TTS.

Specify prompts to be played

+ Add Prompt

Type	Var?	Value	Play as	Actions
TTS	<input type="checkbox"/>	Thank you for choosing to take a survey.	text	  
TTS	<input type="checkbox"/>	The survey will be at the end of your call.	text	  

Setup Survey Block

Next, place a **Setup Survey** block before the call is routed to an agent. Select the **Post agent: Survey will start after talking to an agent** option and enter the DN of the survey application. The example shown below uses the DN 5555, but your survey application might use a different DN. Optionally, you can enable the check box to specify the DN as a variable.

The screenshot displays the 'Application Flow' and 'Properties - Setup Survey' panels. The 'Application Flow' panel on the left shows a sequence of blocks: 'Initialize', 'Self Service', 'Assisted Service' (expanded to show 'User Input', 'Segmentation', 'Set Up Survey', and 'Play Message'), 'Call Data', 'Segmentation - decide how to rou...', 'Setup Survey' (highlighted), 'Route Call - route to default numb...', and 'Finalize'. The 'Properties - Setup Survey' panel on the right contains the following information:

- Properties - Setup Survey**
- This block sets up a survey. It does not trigger a survey.
- Choose one of these options to setup a survey application:
 - ☒ **Post agent** : Survey will start after talking to an agent
 - ☐ **Immediate** : Survey will start immediately
 - ☐ **Rejected** : Survey will not be started
 - ☐ **Not offered**
- Setup survey on this DN (number) ☐ 5555

The call forwards to the survey application. See the [Creating the Survey Application](#) section for more information.

No Survey Segment

The application processes the **No Survey** segment if the caller pressed **2** to decline the survey.

Place a **Setup Survey** block and select **Setup was offered but it was rejected**.

The screenshot displays the 'Setup Survey' block configuration in the Genesys Designer. On the left, the 'Application Flow' pane shows a sequence of blocks: 'Initialize', 'Self Service', 'Assisted Service', 'User Input', 'Segmentation', 'Set Up Survey', 'Play Message', 'No Survey', 'Setup Survey' (highlighted), 'Call Data', 'Segmentation - decide how to rou...', 'Route Call - route to default numb...', 'Setup Survey', and 'Finalize'. On the right, the 'Properties - Setup Survey' pane provides details about the block and its configuration options.

Properties - Setup Survey

This block sets up a survey. It does not trigger a survey.

Choose one of these options to setup a survey application:

- ☐ Post agent : Survey will start after talking to an agent
- ☐ Immediate : Survey will start immediately
- ☒ Rejected : Survey will not be started
- ☐ Not offered

Survey Not Offered

You might have noticed that a third option exists in the **Setup Survey** block - **Setup was not offered - no need to setup survey**.

For reporting, this option records that the caller was never offered a survey. This can happen for several reasons. For example, the caller might have ended the call early or in the **Self Service** phase, or your application might contain a segment in which it does not make sense to offer a survey.

To receive reporting in these scenarios, you must place a **Setup Survey** block in your application and select the **Setup was not offered - no need to setup survey** option to record that this interaction did not include a survey offer.

Creating the Survey Application

The actual survey takes place in a second application. This application is loaded on the number that you specified in the **Setup Survey** block.

A survey application is created with the application type **Default** and behaves in the same way as other applications. You can use **User Input** blocks to ask questions and record responses. Each **User Input** block stores the response from the caller for reporting.

Tip

As survey applications are **Default** type applications, you can use **Route Call** and various other blocks to direct the call if the customer's survey responses meet certain criteria. For example, if the caller inputs a low satisfaction score, you can use a **Segmentation** block to check for low satisfaction scores and a **Route Call** block to route the call to an agent to follow up on the customer's concerns.

Example

The following example demonstrates how to create a simple survey application.

First, create a new application of type **Default** to provide the survey.

In the application, create a series of variables to hold the questions and answers for your survey. In the example below, **question1** and **question2** hold the question that the survey asks the caller, and **survey_iAnswer1** and **survey_iAnswer2** holds the answer from the caller.

Properties - Initialize



This block or phase is typically used to setup variables for the application and initialize them. Assign blocks can be used to calculate expressions and assign their results to variables in this phase.



User Variables



System Variables

Specify User Variables. String values must be surrounded by single quotes.

+ Add Variable

Name	Default Value	Private	Delete
question1	'Was the agent able to answer your question? Press 1'	<input type="checkbox"/>	
survey_iAnswer1		<input type="checkbox"/>	
question2	'How would you rate the agent on a scale of 1 to 5?'	<input type="checkbox"/>	
survey_iAnswer2		<input type="checkbox"/>	

Designer also provides standard variables, which you can view in the **System Variables** tab, that you can use if your company uses standard reporting. For example, instead of using **survey_iAnswer2** to hold the feedback score for the agent, we could instead use **survey_iAgentScore**.

Variable	Editable	Purpose
survey_sOffer	No	Specifies whether a survey was offered, accepted, or rejected. This variable is set by the Setup Survey block.
survey_iRecommendScore	Yes	A rating (on a scale from 0 to 10) that indicates if the company, product, or service is recommended. This variable is used for calculating the Net Promoter Score (NPS).
survey_iAgentScore	Yes	Specifies a user satisfaction score for the agent (if this question is asked in the survey).
survey_iCompanyScore	Yes	Specifies a user satisfaction score for the company (if this question is asked in the survey).
survey_iCallScore	Yes	Specifies a user satisfaction score for the entire call (if this question is asked in the survey).
survey_iProductScore	Yes	Specifies a user satisfaction score for the product (if this question is asked in the survey).
survey_sQ1..10	Yes	You can create these variables (1-10) to store string -type survey responses that will be used for reporting. (Use the naming convention as shown. For example, <i>survey_sQ1</i> , <i>survey_sQ2</i> , and so on.)
survey_iQ1..10	Yes	You can create these variables (1-10) to store integer -type survey responses that will be used for reporting. (Use the naming convention as shown. For example, <i>survey_iQ1</i> , <i>survey_iQ2</i> , and so on.)

Important

Survey answer variables must use the following naming convention:

- The name must have the prefix `survey_`.
- The next character must indicate the data type (for example, `i` for integer or `s` for string).
- Example: `survey_iAnswer`.

Next, we add a series of **User Input** blocks and **Milestone** blocks to the **Self Service** phase. The **User Input** block asks the survey question and the **Milestone** block reports the survey answer.

? Self Service

Q1 - Was your issue resolved?

Q1 - Report

Q2 - Agent Feedback

Q2 - Report

In each **User Input** block, select the question variable in the **Prompts** tab and answer variable in the **Results** tab.

Properties - Q1 - Was your issue resolved?



This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

Prompts **Input** **ASR Settings** **DTMF Settings** **Retry**

Results **Milestone**

Specify prompts to play to collect user input

+ Add Prompt

Type	Var?	Value	Play as	Actions
TTS	<input checked="" type="checkbox"/>	question1	text	

☐ Prompts must finish completely before users can provide input

Timeout - wait for s before assuming that no input was received.

Properties - Q1 - Was your issue resolved?



This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

Prompts Input ASR Settings DTMF Settings Retry

Results Milestone

Store output result (either DTMF entered digits, or the ASR utterance) in this variable

survey_iAnswer1 ▼

In each **Milestone** block, select the question and answer to send to reporting.

Properties - Q1 - Report



This block is used to record a milestone in reports including surveys.

Milestone

question1

☐ use variable

Milestone Type

Survey ▼

Survey Milestone Properties

Survey Question ☒

question1 ▼

Corresponding Answer ☒

survey_iAnswer1 ▼

The following graphics show the process for survey question two, using the standard answer variable **survey_iAgentScore**.

Properties - Q2 - Agent Feedback



This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

Prompts Input ASR Settings DTMF Settings Retry

Results Milestone

Specify prompts to play to collect user input

+ Add Prompt

Type	Var?	Value	Play as	Actions
TTS	<input checked="" type="checkbox"/>	question2	text	

☐ Prompts must finish completely before users can provide input

Timeout - wait for s before assuming that no input was received.

Properties - Q2 - Agent Feedback



This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

Prompts Input ASR Settings DTMF Settings Retry

Results Milestone

Store output result (either DTMF entered digits, or the ASR utterance) in this variable

Properties - Q2 - Report



This block is used to record a milestone in reports including surveys.

Milestone

question2

☐ use variable

Milestone Type

Survey ▼

Survey Milestone Properties

Survey Question ☒

question2 ▼

Corresponding Answer ☒

survey_iAgentScore ▼